

HEALTH AND WELLNESS COMMITTEE OF THE COA

Meeting Notes

9:30 - 11:00 am

December 6, 2022

ZOOM

In Attendance: Marsha Weber, Neal Brown, Barbara Selter, Marcia Pruzan, Revathi Vikram, Eddie Rivas, David Engel (note taker), Kendell Matthews, Wayne Berman, Betsy Carrier, Virginia Cain, Bob Levey, Joyce Dubow, Kathleen Williams (Holy Cross/ PACE), Sean Curry (Prevention of Blindness Society, Program Director)

Staff: Tina Purser Langley

Motion to approve minutes. Minutes approved.

Welcome and introduction of Kathleen Williams from Holy Cross who informed the committee that Holy Cross PACE program will start in Summer 2024. Introduction of Sean Curry, the program director for the Prevention of Blindness Society in DC.

Review of Life Transitions as people age categories and group project progress. The first presentation given was by David and Marsha on Housing. Fact sheet on what to consider if staying in place or moving was presented. Marcia suggested that Age Friendly workgroup chair, Lorraine Driscoll, should review the document. There is a committee concern about presenting reverse mortgage resources. If it is kept in the document, a disclaimer should be clear that the County is not endorsing this method of financing. It was suggested to look at the AARP resources on reverse mortgages to compare the information. Additionally, Betsy noted that the "Legal and Finance" category has a reference to reverse mortgages. The committee suggested to add a top line description and / or add something to keep the categories graphically similar like branding and also adding the new Age Friendly logo. Bob suggested that in addition to the reference to the home sharing program, we should explore intergeneration resources and options. Possibly look at what religious organizations are doing to forge those matches. Generally the committee was in favor of the easy to read design and comprehensive Housing Fact Sheet.

Marcia and Rev presented How to Begin the Conversation noting the Laurie Pross had some edits. They read through their document that discussed why to have the conversation. They positioned the conversation as "a gift" to the recipient with the goal of being positive and informative. Rev, Marsha, and Marcia noted that a recent NY Times article was about "solo agers" and that the conversation needs to address those people also.

<https://www.nytimes.com/2022/12/03/health/elderly-living-alone.html> Kathleen brought up that there are many complicated family situations. People need to make these decisions so their wishes are followed. The committee discussed that this topic is the introductory topic for Planning Life Transitions and planning ahead is a constant theme repeated. Rev presented the draft of the document to the Jai Ho group that meets at the Travilah Senior Center. The response was that they were hungry for information like this. They requested a County facilitator/ legal help and / or coordinator on the topics. They suggested the information be published in print and also online at the 30 Temples websites. The committee discussed adding a legal disclaimer so as not to confuse the document with giving express legal advice. Marcia noted that collaboration should be with Vivian Hsueh, Mona Negm, AAHP, and the office of Community Partnerships. Wayne emphasized the need for legal documentation of the aspects of conversation (will, estate

plans). Marsha stated the need for a *Resources* section and Tina said it should have the 3000 line information. Kendall and Betsy brought up that their section is Legal and Finance and will have some overlap in the topics. Kathleen noted <https://www.voiceyourchoice.org/> as a reference in the chat. Virginia said the document should include that this is an ongoing conversation and circumstances change and to recommend getting legal advice. It was discussed that this document is bigger than a fact sheet and a style for a printed format needs to be figured out.

Kendall and Betsy presented Legal and Financial. Their document listed a multitude of important documents that will be needed by the individual, family member or a guardian – topics to be addressed in master financial and legal plan. It also discussed financial scams and issues to be aware of. The committee discussion was about the value of being prepared, consequences to avoid and informing the public that they do not want the wrong people or government to be making the decisions for them.

Virginia shared the Information Worksheet excel document that lists the document item, where to find it, and who to contact about it. The committee discussed how to keep this document secure but still accessible. The discussion also was about why is planning important and adding in the introduction about how to use this document.

Action item: Subgroups to re-present progress for the next meeting.

Adjorn